

**1** Individually evaluate the organization based on the following criteria:

	Weak	Solid	Great
<b>Leadership Team</b> based on: <input type="checkbox"/> Track record <input type="checkbox"/> Relevant experience <input type="checkbox"/> Continuous learning			
<b>Business Model</b> based on: <input type="checkbox"/> Recurring revenue <input type="checkbox"/> Competitive advantage <input type="checkbox"/> Going market and customer base			
<b>Values &amp; Execution Habits</b> based on: <input type="checkbox"/> Purpose, Vision, & Values <input type="checkbox"/> One-Page Strategic Plan <input type="checkbox"/> Rockefeller Habits usage			
<b>Industry Experience</b> based on: <input type="checkbox"/> Competitive experience <input type="checkbox"/> Industry leadership			
<b>Exit Plan</b> based on: <input type="checkbox"/> Potential acquirers <input type="checkbox"/> Valuation multiples researched			
<b>House in Order</b> based on: <input type="checkbox"/> Capitalization table documented <input type="checkbox"/> Good record-keeping <input type="checkbox"/> Orderly financial statements			
<b>Consistency</b> based on: <input type="checkbox"/> Predictable and consistent results <input type="checkbox"/> Revenue and profit growth each quarter			
<b>Protected Assets</b> based on: <input type="checkbox"/> Patents, trademarks, and copyrights <input type="checkbox"/> Thought leadership <input type="checkbox"/> Unique products or services			

**2** Compare your evaluation with the team or a partner.

**3** Brainstorm 6+ ways to improve fundability over the next period with the team or a partner.

**4** Refine your top 1-3 ideas and write them below.

	Improve	Build	Owner	Deadline
	<input type="checkbox"/>	<input type="checkbox"/>		
	<input type="checkbox"/>	<input type="checkbox"/>		
	<input type="checkbox"/>	<input type="checkbox"/>		